

Community Services Block Grant Reporting Desk Guide

Revised: October 2020

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General Information

This desk guide provides instructions for completing and submitting the reports required as a condition of your agency's Community Services Block Grant awards. This guide, revised in September 2020, replaces any previous versions of the CSBG Progress Report Desk Guide and any outdated instructions on reporting for all CSBG programs.

CSBG Program Staff

Contact the program staff assigned to your agency's region for assistance with completing and submitting reports.

Baltimore Region

Anne Arundel, Baltimore, and Harford Counties, Baltimore City Angela Fraser, pangela.fraser@maryland.gov, 301-429-7516

Eastern Shore & Western Maryland Regions

Upper, Mid- and Lower Shore Counties; Allegany, Garrett, Carroll, and Washington Counties Michelle Bass, michelle.bass@maryland.gov, 301-429-7510

Capital Region

Frederick, Howard, Montgomery, Prince George's, and Southern MD Counties Sanam Kalhoro, sanam.kalhoro-escoto@maryland.gov, 301-429-7524

CSBG CARES (CSBG-CV)

Pursuant to the Coronavirus Aid, Relief, and Economic Security (CARES) Act and requirements of the CSBG program, CSBG-CV funds support eligible activities that prevent, prepare for and respond to the coronavirus. A <u>progress report</u> and <u>financial status report</u> must be submitted on a monthly basis. Progress reports should illustrate how your agency utilized CSBG-CV funds to support eligible activities during the reporting period. Financial status reports must <u>only</u> show expenditures of CSBG-CV funds during the reporting period.

To minimize administrative burden, the first progress report and financial status report for CSBG-CV funds will cover the period of March 27, 2020 – August 30, 2020 and must be submitted to the Department by September 15, 2020. Subsequent reports must be submitted by the fifteenth of each month until all CSBG-CV funds are expended. The period of performance for CSBG-CV funds is March 27, 2020 through September 30, 2022.

Completed reports must be submitted via the <u>DHCD Project Portal</u>. CSBG-CV reports must be uploaded to your agency's FY20 CSBG-ND award. The name (ID) of this award in the portal begins with <u>CSBG-ND-2020</u>.

CSBG-Discretionary (CSBG-D)

CSBG-D funds support efforts to eliminate poverty, promote self-sufficiency, or to promote community revitalization through asset-building programs; innovative programs that address poverty; and programs that fill documented gaps in service. Progress reports should illustrate how your agency utilized CSBG-D funds to achieve these program goals. Financial status reports must show all expenditures of CSBG-D funds during the reporting period.

For State Fiscal Year 2021 (SFY21), a <u>progress report</u> and <u>financial status report</u> must be submitted on a quarterly basis by the fifteenth of the month following the end of each quarter of the grant term: **October 15, 2020, January 15, 2021, April 15, 2021, and July 15, 2021**.

The final report is due by **July 15, 2021**. The final progress report must describe the completed scope of services, list of accomplishments, any challenges encountered in completing the scope of services, and such other information as may be required by the Department. The final financial status report must summarize total expenditures charged to the CSBG-D award during the reporting period.

Completed reports must be submitted via the <u>DHCD Project Portal</u>. CSBG-D reports must be uploaded to your agency's FY21 CSBG-D award. The name (ID) of this award in the portal begins with <u>CSBG-D-2021</u>.

CSBG-Non-Discretionary (CSBG-ND)

CSBG-ND funds are the annual formula-based allocation distributed to Community Action Agencies to support agency operations. Financial status reports must show monthly expenditures of CSBG-ND funds. Expenditures must align with your agency's approved Community Action Plan and/or approved Budget Modification.

For Federal Fiscal Year 2021 (FFY21), a <u>financial status report</u> must be submitted on a monthly basis by the fifteenth of the month following the end of each month of the grant term (October 1, 2020 – September 30, 2021). The final report is due by **October 15, 2021**.

Completed reports must be submitted via the <u>DHCD Project Portal</u>. CSBG-ND reports must be uploaded to your agency's FY21 CSBG-ND award. The name (ID) of this award in the portal begin with <u>CSBG-ND-2021</u>.

Financial Status Report Form

A financial status report must be completed and submitted with each progress report using the Excel workbook template provided by the Department. The financial status report must show how CSBG funds were utilized during the reporting period.

The financial status report forms for all CSBG programs are provided by the Department in a single Excel workbook. Contact the CSBG program staff for your region to receive a copy of the workbook, if needed.

Instructions:

- 1- Cells A9-A21 list the cost categories shown in your agency's approved award budget. If a particular cost category is not included in your agency's budget, leave that row blank. If cost categories should be added, please contact DHCD's program staff for assistance. Also note that budget revision requests must be reviewed and approved by the Department's CSBG program staff before adjustments are made to your agency's CSBG award budget.
- 2 In cell B4, enter your agency's full name.
- 3 In cell B5, enter your agency's FEIN.
- 4 In cell E5, select the reporting period covered by this report.
- 5 In cells B9 B21, enter the approved budget amounts for each cost category.
- 6 In cells C9 C21, enter total actual expenditures for the reporting period.
- 7 In cells D9 D21, enter cumulative expenditures (from July 1 to the end of the reporting period) for each cost category.
- 8 In cells E9 E21, enter the amount of funds in each cost category that have been obligated as of the end of the reporting period.
- 9 This report must be reviewed and certified by your agency's fiscal officer and executive director.
- 10 -Submit a PDF copy of this certified report via the DHCD Project Portal. Ensure that the report is uploaded to the correct award record in the portal.

Report Submission Instructions

Your agency's completed progress report and financial status report forms must be submitted via the DHCD Project Portal. The following instructions will assist you with submitting your reports. Contact the CSBG program staff for your region if you need additional assistance.

DHCD Project Portal Website

To submit your agency's quarterly reports, you must have a registered user account. For assistance with new user registration, logins, and/or forgotten passwords, please review the training documents for those activities:

- DHCD Project Portal New User Registration Training (PDF)

 https://projectportal.dhcd.state.md.us/Documentation/MDDHCD/NewUserRegistrationTraining.pdf
- DHCD Project Portal Login Training (PDF) https://projectportal.dhcd.state.md.us/Documentation/MDDHCD/LoginTraining.pdf

System Compatibility

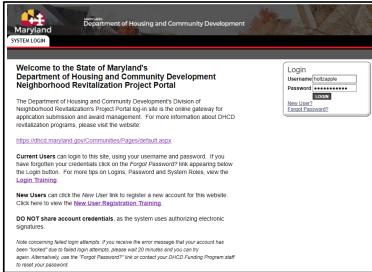
The DHCD Project Portal system is fully supported by the Microsoft Internet Explorer (IE) web browser. **<u>DO NOT</u>** use Google Chrome, Microsoft Edge, or Mozilla Firefox when working in the DHCD Project Portal. These browsers are not fully supported and may cause unexpected errors.

Creating a New Progress Report Form

Following the execution of the grant agreement, awardees submit their quarterly progress reports through the DHCD Project Portal. These progress report forms will remain available for as long as the award remains active.

A. Login to the DHCD Project Portal at https://projectportal.dhcd.state.md.us

Refer to the linked training documents and/or contact the DHCD program staff for login assistance.



B. Use the "My Applications" Search Tab to Access the Award Record

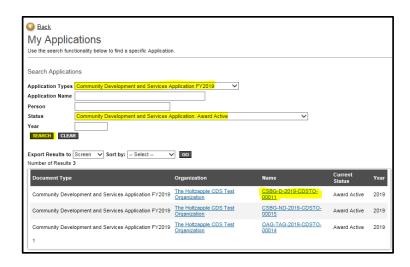
Select the Application Type for the correct award year (e.g. FY2020, FY2021)

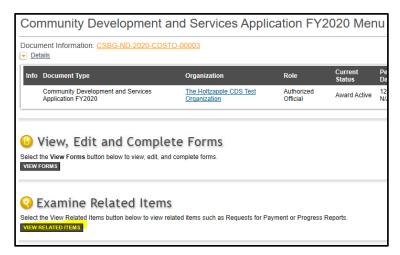
You can also select the Status of "CDS – Award Active" to return only those award records that have been made "Active".

Click the Search button. And then click on the "Name" (ID) link to enter the award record.

C. Go to the "Related Items" Page of the Award Record

On the Award record's Main page, click on the "View Related Items" button to open that section/page. This is the page that contains the links to create new Progress Reports or Requests for Payment.

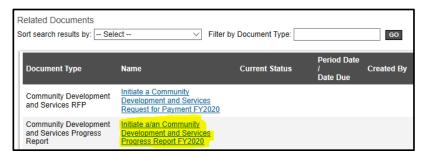




This page then stores and displays a listing of created and processed Progress Reports and Requests for Payment. Additionally, this page stores any system messages sent in relation to the application/award workflow. When starting out, this page will be empty; but as records are created, submitted, and approved they will appear here as a list.

D. Click on the link to "Initiate" a New Progress Report

Click the link to "initiate" a new Progress Report record.



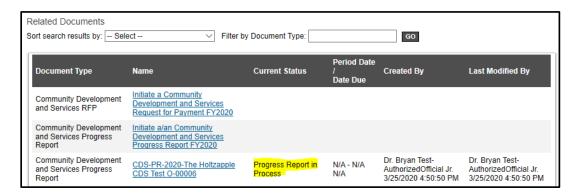
Upon successful creation, you will see the new Progress Report record's "Menu" page.



NOTE: The system allows only one Progress Report to be "In Process" at a time. If a Progress Report was previously created but has not yet been submitted or canceled, this error message will appear:



Existing "In Process" Progress Report records can be found and accessed on the "Related Items" page. Locate the existing Report and click on the "Name" (ID) link to resume work. Contact the DHCD program staff for further assistance.



Completing the System's Progress Report Form

A. Click on the "View Forms" button to open the forms menu



B. Progress Report Forms Menu

The Forms Menu includes links to online and print versions of the Progress Report Training, as well as, a link to the system's progress report form and a link to submit or cancel the report.

Click on the Progress Report page link to enter and fill-out the form.

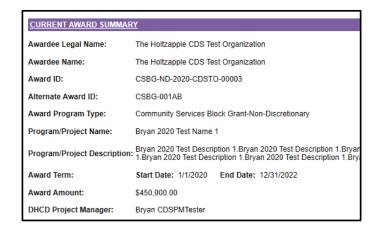


C. Progress Report Form

This page contains five sections. Fields marked with a red asterisk (*) are required.

1) Current Award Summary
Data in this section includes
award funding program type,
program/project name, project
description, award term, award
amount, and the name of DHCD
Project Manager assigned to the
award.

This information is presented to place context to this Progress Report. Review this information to ensure that you are completing a Progress Report Form for the correct award record.



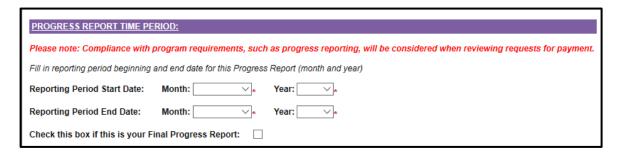
2) Award Resource Documents
This section includes links to the
Award Payment Activity Report,
the Most Recent Progress Report,
and the Executed Award
Agreement; and where
applicable, any executed award
amendments.



NOTE: If no Request for Payment or Progress Report record has been submitted yet, these two links will not work.

3) Progress Report Time Period

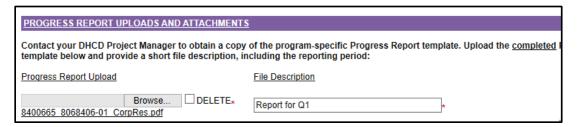
In this section, select the "Start" and "End" dates for the Reporting Period. Where applicable, check the box if this report represents the 'Final Report" of the award.



4) Progress Report Uploads and Attachments

In this section, upload the program-specific progress report form, the financial status report form, and any pertinent supplemental documents. Enter file descriptions for each attachment.

a) In the first upload section, attach the completed program-specific progress report form, as provided by CSBG program staff. Enter a short description of the file.



b) In the second upload section, attach the financial status report and other supplemental documents in support of this Progress Report. Enter a short description of the file. To upload another file, click the save button. **NOTE**: Uploaded files are limited to a maximum file size of 25 Megabytes (MB) per page save.

Upload any additional or supporting documents below	v and provide a short description of each file:
More uploads fields will appear upon page-Save. Uploade	ed files are limited to a maximum file size of 25 Megabytes (Mb) per page save.
Supporting Uploads	File Description
Browse □ DELETE <u>8400665 8068413-02 LocalGovRes.pdf</u> Browse	Extra Doc A

c) In the narrative field, enter more detailed notes about the supplemental and supporting documents you have attached.

Provide any detailed notes concern	ing the attached Progress Report and Additional or Supporting Documents:
0 of 2000	

5) Progress Report - Certify and Submit In this last section, enter the name, title, email address, and phone number of the contact person for this Progress Report.

If CSBG program staff have any questions about the Progress Report, this is the person who will be contacted.

PROGRESS REPOR	RT - CERTIFY AND SUBMIT
	to the best of my knowledge, the information in this document mpliance with the terms of the Award Agreement.
Contact Name:	*
Contact Title:	*
Contact Email:	*
Contact Phone #:	*

Submitting the Report

A. Prior to submission, check that there are no page errors.

Prior to submission, all required fields must be completed with no page errors present. Look to the application's "Forms Menu" page or the "Navigation Links" at the bottom of each application page. If the icon looks like an orange stop-sign with a white hand, that is an indication of a page error that must be corrected.

If an error is found, revisit that page and make the corrections as instructed by the error message.

Once an error is corrected and the page has been re-saved, a properly completed page will show a green traffic signal icon with this confirmation message.







IMPORTANT: Be sure to save all the information entered and uploaded **BEFORE** submitting your report. Otherwise, the information will be lost, and you will have to repeat all of the steps above.

B. Click the green Submit Report button.

To submit the Progress Report, click the green "Click Here to Submit or Cancel this Report" button, after you have saved your progress.

C. Status Change

To complete the submission of the Progress Report, click the grey "Confirm the Submission of this Report" button on the Status Options Page.

CLICK HERE TO SUBMIT OR CANCEL THIS REPORT

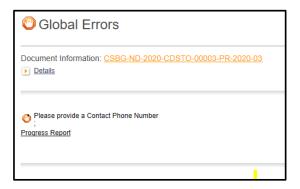
Possible Statuses
PROGRESS REPORT SUBMITTED
CONFIRM THE SUBMISSION OF THIS REPORT

D. On-Screen Confirmation

When the Progress Report has been submitted successfully, the main page will re-load and the status will now read as "Progress Report in Review".

If a page error is found, the Report will not be submitted and an error screen will be shown, with a link to the page where the error was found. After correcting the page errors, follow the submission steps again.





E. Email Confirmation

Upon successful submission, a system email will be sent to the email address on your account as a second form of confirmation.



F. Confirmation of Approval

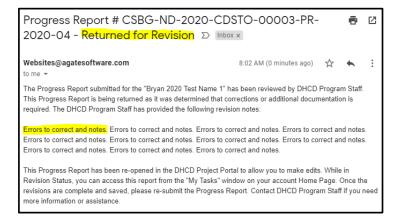
When CSBG program staff receives a Progress Report, the form is reviewed and approved. When the review steps are completed, an email notification is sent to the Awardee to confirm the approval.



Revising a Progress Report

While the Progress Report is "In Review," CSBG program staff may return the Progress Report for edits or additional information or documentation. If the DHCD program staff returns the Progress Report for revisions, a system email message will be sent, and the following steps should be followed.

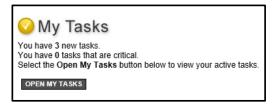
A. Review the "Returned" system email This email serves as an alert that the Progress Report needs revisions.



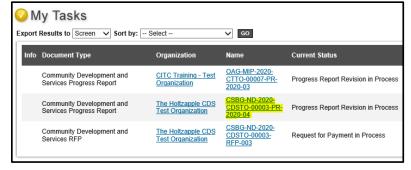
B. Access the Progress Report Record

While a Progress Report is in the "Revision In Process" status, the Report record can be located and accessed from the "My Tasks" window of the account Home Page.

1. Click the "Open My Tasks" button to view any items currently in the process



2. Click on the "Name" (ID) of the Progress Report to re-open the form.



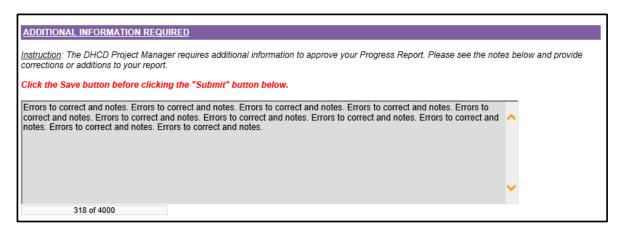
C. Revise the Progress Report

- Click the "View Forms" button to re-enter the Progress Report record.
- ► View, Edit and Complete Forms
 Select the View Forms button below to view, edit, and complete forms.

 VIEW FORMS
- 2. Click the Progress Report Form page link.



3. Scroll to the bottom of the page to view the notes provided by CSBG program staff, detailing the revisions needed. Contact the program staff if you need more information or direction.



IMPORTANT: Be sure to save all the information entered and uploaded **BEFORE** submitting your report. Otherwise, the information will be lost, and you will have to repeat all the steps above.

D. Re-Submit the Progress Report

When all requested revisions are completed and saved. Scroll down to the bottom of the screen, below the "Additional Information required" notes, and click the green "Submit" button.

NOTE: Save the revised report information <u>BEFORE</u> clicking Submit.

CLICK HERE TO SUBMIT THE REVISED REPORT

E. Status Change

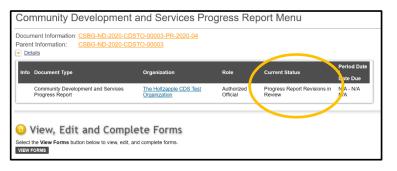
To complete the submission of the Revised Progress Report, click the grey "Confirm the Re-Submission of this Report" button on the Status Options Page.

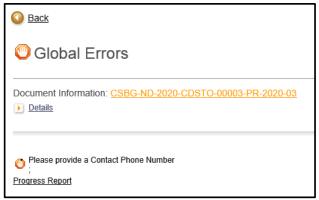
Possible Statuses PROGRESS REPORT REVISIONS SUBMITTED CONFIRM THE RE-SUBMISSION OF THIS REPORT

F. On-Screen Confirmation

When the application has been submitted successfully, the main page of the application will re-load and the status will now read as "Progress Report Revisions in Review".

If a page error is found, the Progress Report will not be submitted and an error screen will be shown, with a link to the page where the error was found. After correcting the page errors, follow the submission steps again.





G. Email Confirmation

Upon successful submission, a system email will be sent to the email address on your account as a second form of receipt and confirmation.

